Using ProCite 5: A Guided Tour

Contents

Overview

This chapter guides you through basic ProCite functions, including entering information into a ProCite database, sorting records, searching a database, printing bibliographies, and citing references within Microsoft Word or WordPerfect.

First you must have installed the full ProCite program, which includes folders that contain the Sample Database and various output styles. If another user has experimented with the sample database by adding, modifying, or deleting records, you may want to reinstall ProCite to start with a fresh copy.

After completing the exercises in this guided tour you should be able to:

- Easily navigate references in a database

- Build a database by importing references and by entering references manually

- Search and sort a ProCite database

- Create standard and subject bibliographies

- Prepare a manuscript and bibliography within a word processor

You can stop these lessons at any time by closing ProCite.

Getting Started

Online Help

When using ProCite, many of your questions can be answered using the online help that comes with the program. There are several ways to access online help when using ProCite:

- Select **Help** from the **Menu** bar to find a topic.

- Many ProCite dialogs include a **Help** button so you can see information related to the current activity.

- Display context-sensitive help by pressing the F1 key (Windows) or the **Help** key (Macintosh). If no context-sensitive help is available, choose from the list of topics displayed.

Opening an Existing Database

The exercises in this guided tour use the Sample Database that installs with ProCite. This database is used to demonstrate navigating a database, entering references, searching and sorting references, and creating bibliographies.

Exercise — Opening the Sample Database

In this exercise you will open the Sample database. If you already started ProCite, go to the **File** menu and choose **Open,** then continue with step 3.

To open the Sample database:

1. Start ProCite:

- **Windows:** From the **Start** menu, choose **Programs,** locate the **ProCite 5** program group, and choose **ProCite.**

- **Macintosh:** Open the ProCite 5 Folder and double click the ProCite program.

2. A file **Open** dialog displays for you to locate and open a database. If not, go to the **File** menu and choose **Open.**

Note: If ProCite has already been used on this machine, it may automatically open the last ProCite file used (this could be a database, list, output style, or workform). Check the title bar to confirm the Sample database is open. If not, close the file, and from the **File** menu select **Open.** Then continue with step 3.

3. In the file Open dialog, locate and double-click on the Database folder located in the ProCite 5 folder.

Note: Make sure the **Open as read-only** (Windows) or **Read-Only** (Macintosh) box is not selected. If it is checked, you cannot make any changes to the database.

Locate and double-click on Sample Database (under Windows it includes the extension .PDT). ProCite opens the Sample database.

The database window displays a record list of abbreviated records. By default the first Author field, Title field and Date field are shown from each record.

A Status line at the bottom of the window indicates the sort order (Author/Title/Date in Ascending order by default), the number of records marked, the number of records displayed in the current list and the total number of records in this database. The Sample database contains 40 references using different types of workforms.

In the abbreviated record list you can browse through single-line records, mark or unmark records, or display records in full for viewing or editing. Records can also be formatted for previewing the bibliographic style at this window.

Note: Many ProCite menu items have a corresponding keyboard equivalent and/or toolbar icon. The keyboard equivalents appear on the menus next to the associated commands.

Use the next section of this guided tour to learn ways to navigate records in a ProCite database.

Navigating a ProCite Database

In this section of the guided tour you will learn to:

- Customize the record list to display specific fields

- Click sort by column heading

- Use the Preview Pane to view a reference in more detail

- Use the GoTo tool

- Drag and drop between databases

Customizing the Record List to Display Fields

While the default record list display shows only three ProCite fields from each record *(Author, Title* and *Date),* the list can be customized to display up to six fields for each record.

In this exercise you will customize the abbreviated list by selecting four fields to display and changing the column widths.

Exercise — Customizing the Display

To customize the record list display:

1. From the **View** menu, choose **Configure Record List** to display the Configure Record List dialog:

On the Record List tab, the **Layout** box contains three columns of options:

- The **Show** column of check boxes is used to show which of the six fields are displayed.

- The **Column Header** text boxes allow you to enter header text to be displayed above each field in the record list.

The **Displayed Field** column is where you select the fields to display in the order you want them to appear.

2. To rearrange the order in which the fields are displayed, first click on the **Show** check box for **Title** to remove this field from those shown. Next click on the first field (currently **Record ID)** to select this field for the display. Use the next step to change this field to display the *Title* field first in the record list.

3. From the **Displayed Field** column, click on the arrow to the right of **Record ID** to select the *Title* field as the first field to display. Choose **Title** from near the top of the field list.

Note: The field list includes all 45 ProCite fields plus five "special" fields at the top of the list. The special fields shown are **Author, Title, Date, Workform** and **Record Number.** These fields include all related fields respectively. For example, Author includes both the *Author, Analytic* (01) and *Author, Monographic* (07) fields from the various workforms. Use the special fields when you want to include all authors, titles and dates from a variety of workforms used in the database.

4. The Column Header needs to be changed to reflect header text appropriate for the title field. Click the first field's **Column Header** text box and type **Title** as the descriptive text for this field.

5. Click the **Show** check box for Keywords to display the *Keywords* field as the fourth field for each record.

6. Click **OK** in the Configure Record List dialog to save the changes and return to the record list. ProCite displays the fields in the order you selected:

You can easily change the width of the columns by dragging between column titles. Use the next exercise to change the width of the *Date* field in the record list window.

Exercise — Changing the Column Width

To change column widths:

1. To see more of the *Keywords* field, move the pointer to the column heading divider between **Date** and **Keywords.** The pointer changes to a horizontal arrow.

2. Drag the vertical bar to the left to reduce the width of the *Date* field.

3. Experiment changing other column widths.

Click Sorting on a Column Heading

Although the *Author* field, or in this case the *Title* field, may be the first field displayed from each record, the records are not automatically sorted by that field. Use the following steps to sort by a displayed field using the click sort method.

Exercise — Changing the Sort Order Instantly

To quickly change the sort order of the record list:

1. To sort by the *Date* field, click on that field's column header. The records are sorted by date in ascending order. Click a second time to change the sort to descending.

2. Experiment sorting the records by the *Author* and/or *Title* fields.

Using the Preview Pane to View a Reference

The Preview Pane displays a highlighted record formatted with an output style. You may find this useful when browsing a record list to compare data or to preview records formatted with various output styles.

Exercise — Previewing a Formatted Reference

To preview formatted references:

1. From the **View** menu, choose **Preview Pane.**

2. Highlight the record by author Kraft, Donald H. ProCite formats the highlighted record using an output style (ANSI is the default style) and displays it in the preview pane.

Note: You can move the horizontal divider to allow the preview pane more or less space.

3. To switch to a different output style (bibliographic format) for the preview pane, go to the **View** menu, choose **Configure Record List** and click the **Preview Pane** tab.

4. Click the **Output Style** arrow and select a style from the list. Use the **Optional Fields** check boxes to view additional information in your Preview. Click **OK** to view the formatted reference.

5. When you no longer want to view formatted references, deselect **Preview Pane** from the **View** menu or use the corresponding toolbar icon.

Using "Go To" Commands to Find References

You can move through the Sample database simply by browsing with the scroll bar. However, this is not practical when using a large database. To locate records in a large database, use the **Go to Record** commands.

Exercise — Using the "Go To" Commands

To use the Go To commands:

1. Use the **Go To** commands from the **View** menu or the toolbar. You can go to a specific record, go to the first record, go to the previous record, go to the next record, or go to the last record in the list.

2. To find a record based on the sorted order of a database, use the **Go to Record** command (the first button on the Go To toolbar).

3. To locate the record by Helen Schwartz, type the first few characters of the author's last name in the first text box in the **Go To Record** dialog.

4. If the sort order is not currently **Author/Title/Date,** select that order by using the arrow to the right of the text box.

5. Click **OK** to complete the search. ProCite searches from the top of the record list and highlights the record that most closely matches the text.

6. Experiment using the other Go To commands to move between records in the Sample database.

Drag and Drop Between Databases

You can copy full records between ProCite databases. To copy records between databases, you need to have both databases open. Use the following exercise to copy a record from the Sample database to another database named Turtles.

Exercise — Copying a Record from One Database to Another

To copy a record from one database to another:

1. Open the ProCite database named Turtles (Under Windows it will include the extension .PDT). From the **File** menu, choose **Open.** The database is located in the Database folder located in the ProCite 5 folder.

2. From the **Window** menu, select **Tile** to display both the Sample database and the Turtles database on the screen:
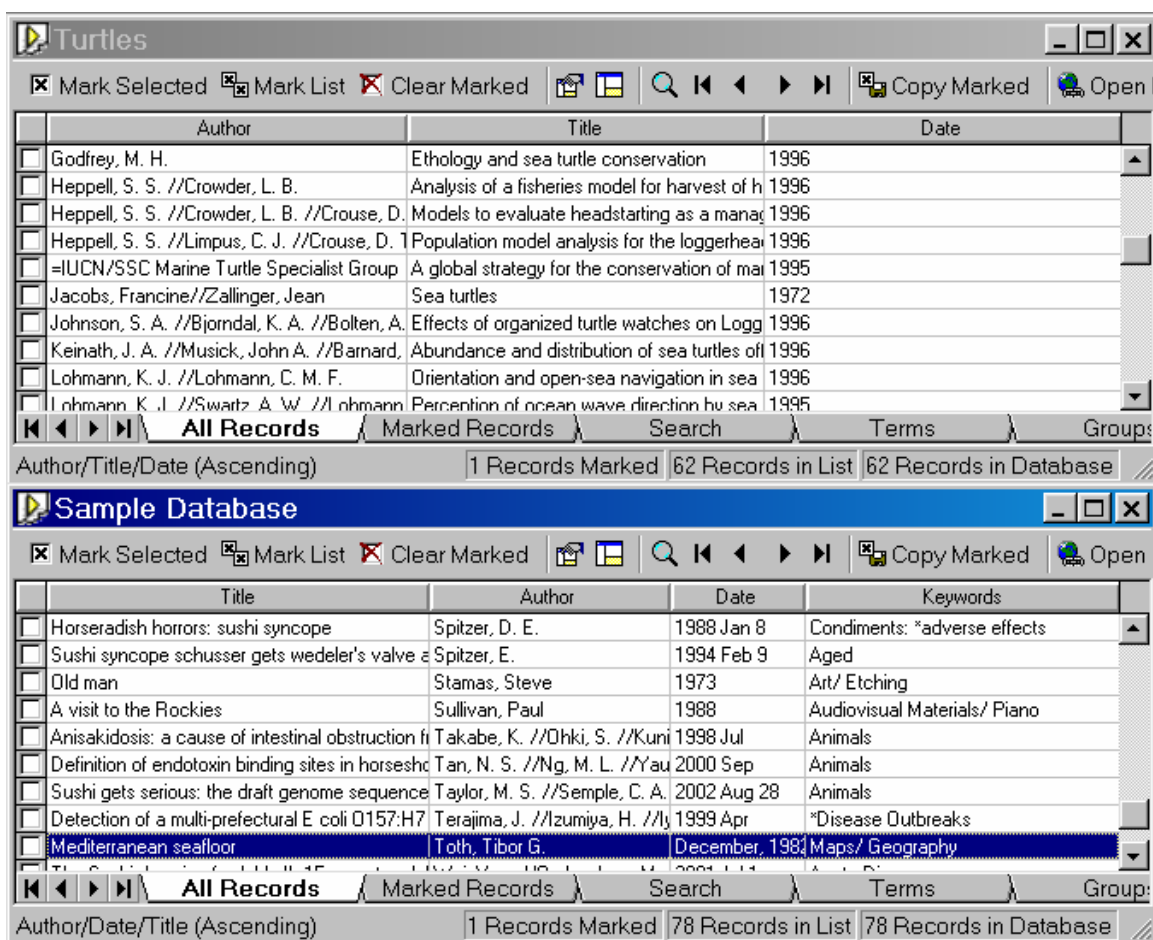
3. In the Sample Database, highlight the record by **Toth, Tibor** and drag it to the Turtles database. This places a copy of the record in the Turtles database.

4. Close the Turtles database. The new record is saved and marked.

5. Maximize the Sample Database window to continue working with the file.

Entering Records

In this section of the guided tour you will learn to:

- Import tagged references from online, CD-ROM and Web-based services

- Enter and edit references manually

- Configure duplicate checking

Use the following exercises to gain experience importing, entering and editing references in ProCite.

Importing Records from a Saved Text File

Before importing files downloaded from an information service it is important to determine from which service the records were retrieved. Each service saves the same information in a slightly different format. The format is significant to the configuration file used in ProCite.

Configuration files are used to tell ProCite how a file of imported records is organized. Refer to *Appendix C: Configuration Files* in the BiblioLink II Manual for a list of configuration files supplied with ProCite and the specific databases from which you can import data. The Biblio-Link II Manual is a PDF file found on your ProCite CD. If a configuration file is not available for a service you use, you can modify an existing file using the Biblio-Link II program installed along with ProCite.

Exercise — Importing Records

To import a file of records retrieved from the National Library of Medicine's PubMed database and saved to a tagged text file:

1. At the PubMed web site (www.PubMed.gov), perform a search for "sushi" and save your data as a text file.

a. When you have your search results, from the pull-down menu by the Display button, select MEDLINE. If you wish, you may then click on the Display button to see the MEDLINE format displayed.

b. From the pull-down menu by the Send to button, select File.

c. Click on the Send to button to save the file to your computer.

Note: In the picture below the file was saved with the name sushi.txt, but you can name the file whatever you like, as long as the file name contains no characters not allowed by your operating system.

2. In ProCite, go to the **Tools** menu and choose **Import Text File.**

3. In the Open Import File dialog, locate the folder and choose the file you saved from PubMed. ProCite displays the tagged text file:

```
sushi.txt                                                          _ □ ×

File Type:        File Format:                  Target Database:
Tagged      ▼     Pubmed         ▼  ...         Sample Database  ▼  ...     Transfer

PMID- 14615026                                                        ▲
OWN - NLM
STAT- in-data-review
DA  - 20031117
IS  - 0891-0618
VI  - 26
IP  - 3
DP  - 2003 Nov
TI  - Proteomic characterization of the human cortical neuronal cell line HCN-2.
PG  - 171-8
AB  - Neuronal marker proteins are widely used for characterization and
      identification of normal and tumor tissue of the central nervous system,
      but the most commonly used neuronal markers have inherent methodological
      problems. We used a proteomic approach with two-dimensional (2-D) gel
      electrophoresis and subsequent MALDI identification to identify possible
      new marker proteins in the human cortical neuronal cell line HCN-2. We
      found 14 proteins that previously were predicted only on the basis of open
      reading frames from mRNA sequences or DNA. We could unambiguously identify
      the following proteins: Bab55091, BK65A6.2 (Novel Sushi Domain (Scr
      repeat), glucosidase II alpha subunit, glucosidase II precursor (KIAA0088
      protein), HSPC108, hypothetical 35.8 kDa protein, hypothetical 40.7 KDA
      protein, hypothetical 49.4 kDa protein, leucine-zipper protein FKSG13,
      lysophospholipase homolog, mitofilin (fragment), P1.11659_4, reticulocabin
      precursor and one unknown protein for MGC:10432. We could prove the        ▼
```

4. In the **File Type** drop-down list, choose **Tagged.**

5. In the **File Format** drop-down list, choose the service from which you retrieved the tagged records. For this file transfer, choose **PubMed.**

6. In the **Target Database** drop-down list, choose the Sample database to receive the records.

Note: You can import records to an existing database or specify a new one by clicking the Browse button (...) and assigning a name to the new database.

7. Click **Transfer** to begin importing records.

8. When the transfer is complete, ProCite tells you how many records were imported. Click **OK** to continue.

9. Close the Import Text File window and return to the record list.

10. The imported records are marked. Click the **Marked Records** tab at the bottom of the window to display only the records you just transferred.

11. Click the All Records tab to return to the full list of records.

Searching and Importing Records Directly

From an Online Database

The following exercise guides you through the basic steps of connecting to a remote database, searching the database, and saving the references that you want to keep. In

order to follow this guided tour, you must be at a computer with Internet access — with either a dial-up or direct network connection.

For this guided tour, you will connect to a the U.S. Library of Congress's Voyager database.

See *Chapter 15: Internet Capabilities* for more information about Internet searching.

Dial-up Internet Connections

If you use a modem and phone line to connect to the Internet, as opposed to a direct network connection, please note this connection information.

Connecting: Most dial-up connection settings are configured to automatically dial and connect to the Internet when you use an application that requests an online connection (such as ProCite's Internet Search feature). However, some Internet providers, such as America Online, require that you establish an online connection (sign on) before attempting an Internet Search with ProCite.

Disconnecting: ProCite does not disconnect your Internet connection at any point. You need to shut down your connection when you have finished using ProCite's Internet Search feature.

Exercise — Internet Searching

To search and import records from an online database:

1. From the **Tools** menu, select **Internet Search** to open a temporary Internet Search database.
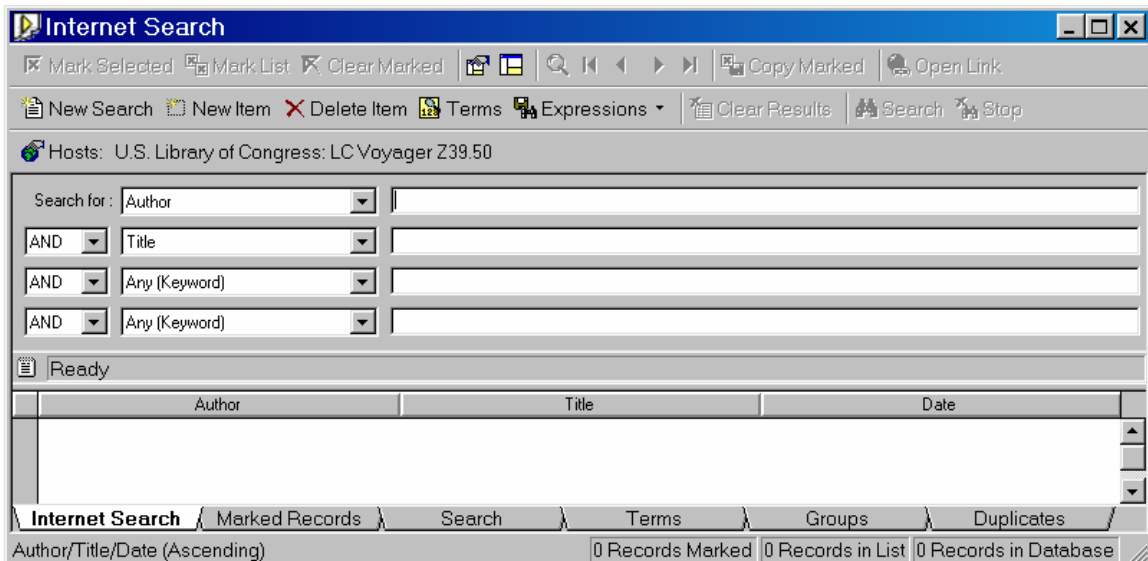
2. Select the Internet database(s) you want to search.

a. Click the **Hosts** button.

b. Click **Clear Marks** to deselect any selected databases.

c. Scroll to **U.S. Library of Congress: LC Voyager z39.50.**
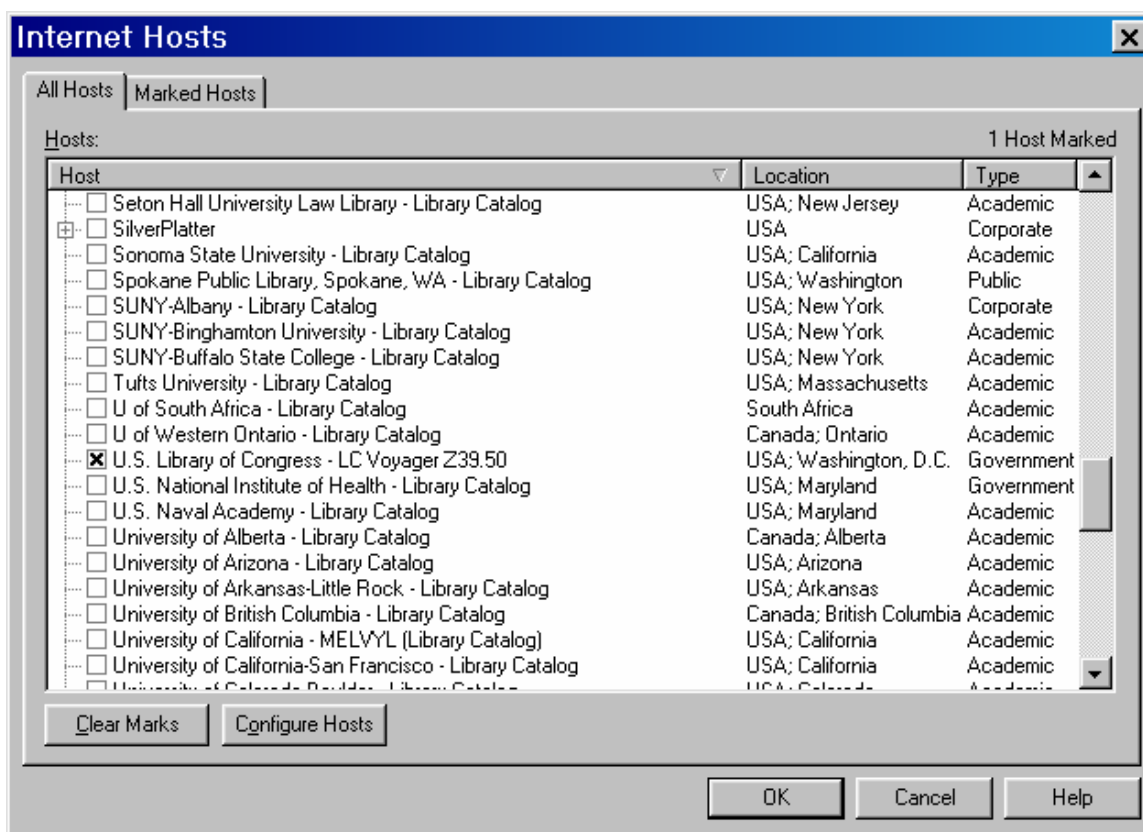
d. Click the Marked Hosts tab to verify that the only database marked for searching is **U.S. Library of Congress: LC Voyager z39.50.** You could have marked multiple databases for searching.

e. Click **OK** to save the setting and return to the Internet Search tab. Notice the database name next to the **Hosts** button.

3. Build your search expression.

Let's say you are interested in information about the movie For Whom the Bell Tolls with Gary Cooper.

4. Below and to the right of **Search For** locate the **Title** drop-down selection. To the right of **Title** type:

For Whom the Bell Tolls
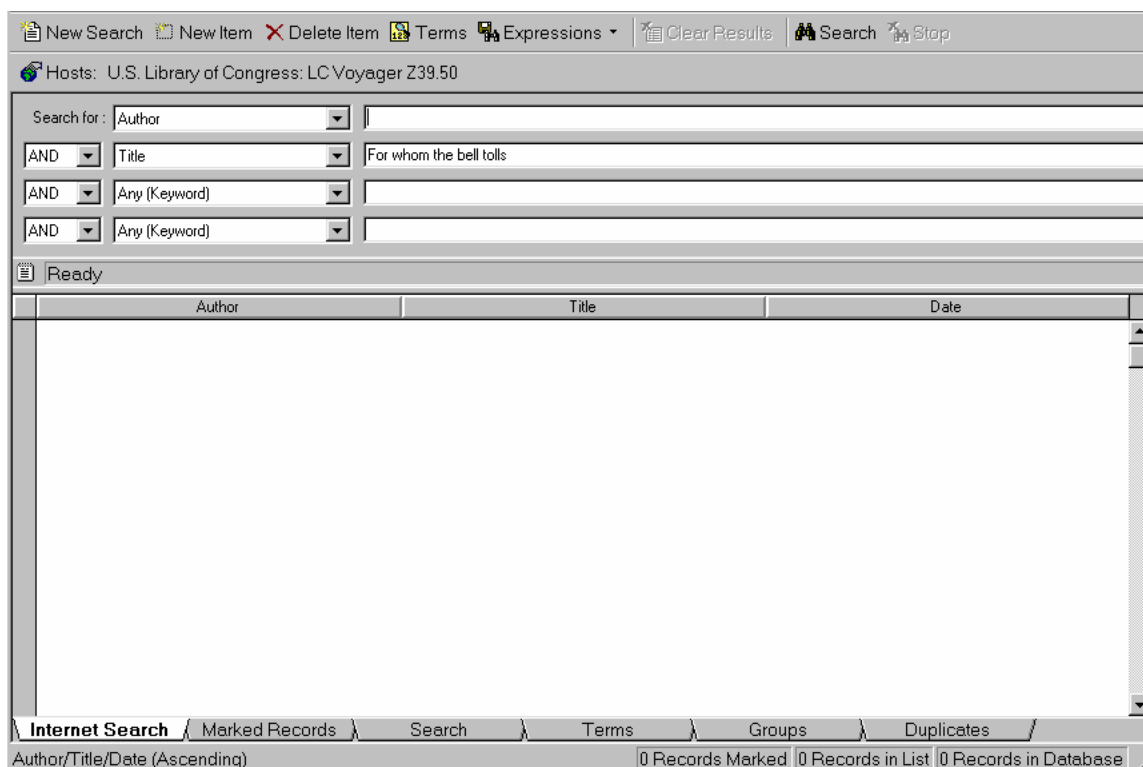
5. To connect and search, click **Search.**

Note: If you haven't already established a connection, your dial-up configuration should automatically dial and connect. If the connection is not successfully established, ProCite alerts you with an error message and stops the search attempt.

ProCite sends the search request to the online database, which in this case is the U.S. Library of Congress. The status line between the search strategy and the record list keeps track of how many records are found and imported. When done, the search results display in ProCite's record list:
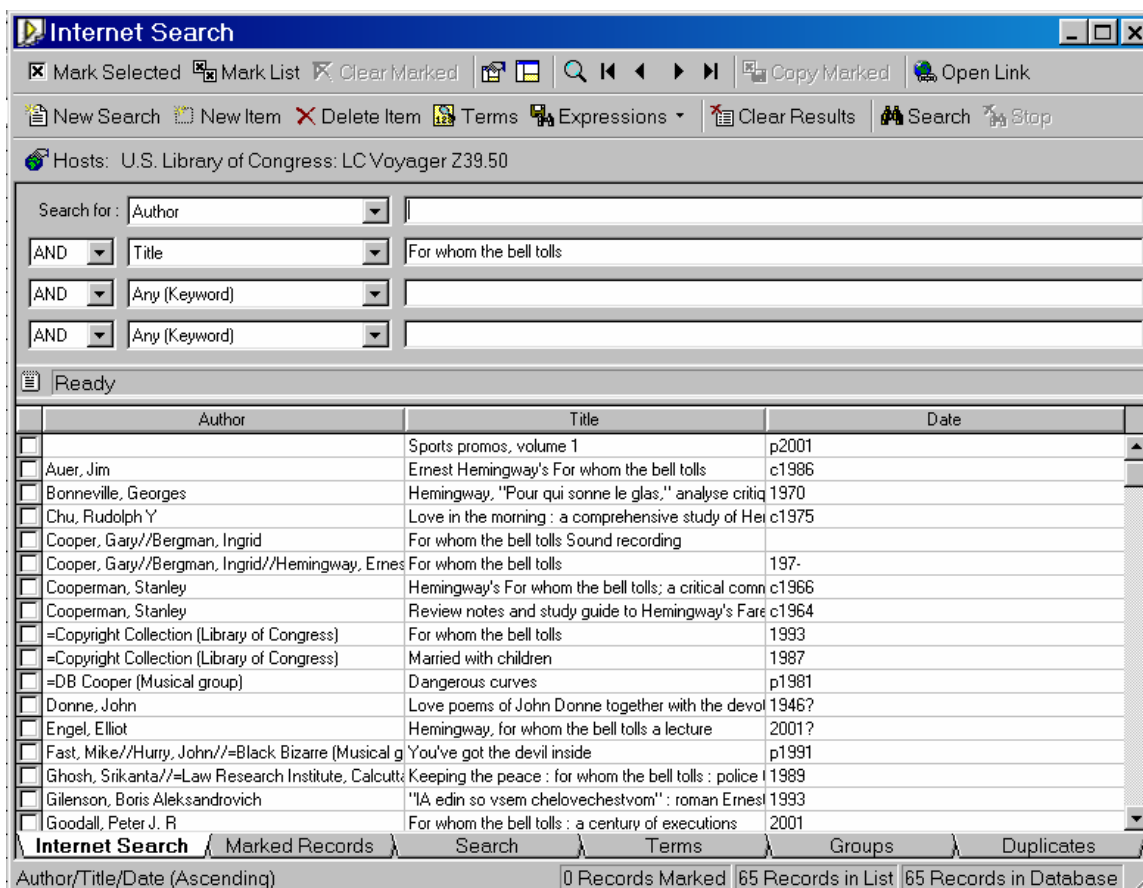
In this case, 65 records were found.

Note: If too many records are found, and you find yourself waiting for hundreds or thousands of records to download, you can cancel the retrieval by clicking the **Stop** button.

6. If the search was too broad, finding too many records, you can refine the search to get closer to exactly those references you want. We will refine this search by looking for just the records showing Cooper as a performer:

a. Click **Clear Results** to delete the previous search results. When asked to verify the deletion, click **Yes.**

b. Leave the **Title** search line as entered. Click in the third pull-down menu, which currently says **Keywords,** and select Credits/Performers from the list and type **Cooper** as your search term.

    Note: ProCite ignores the previous line, since no text is found in the text box. Notice that each line is connected by the word AND, which requires that each line of search criteria be met.
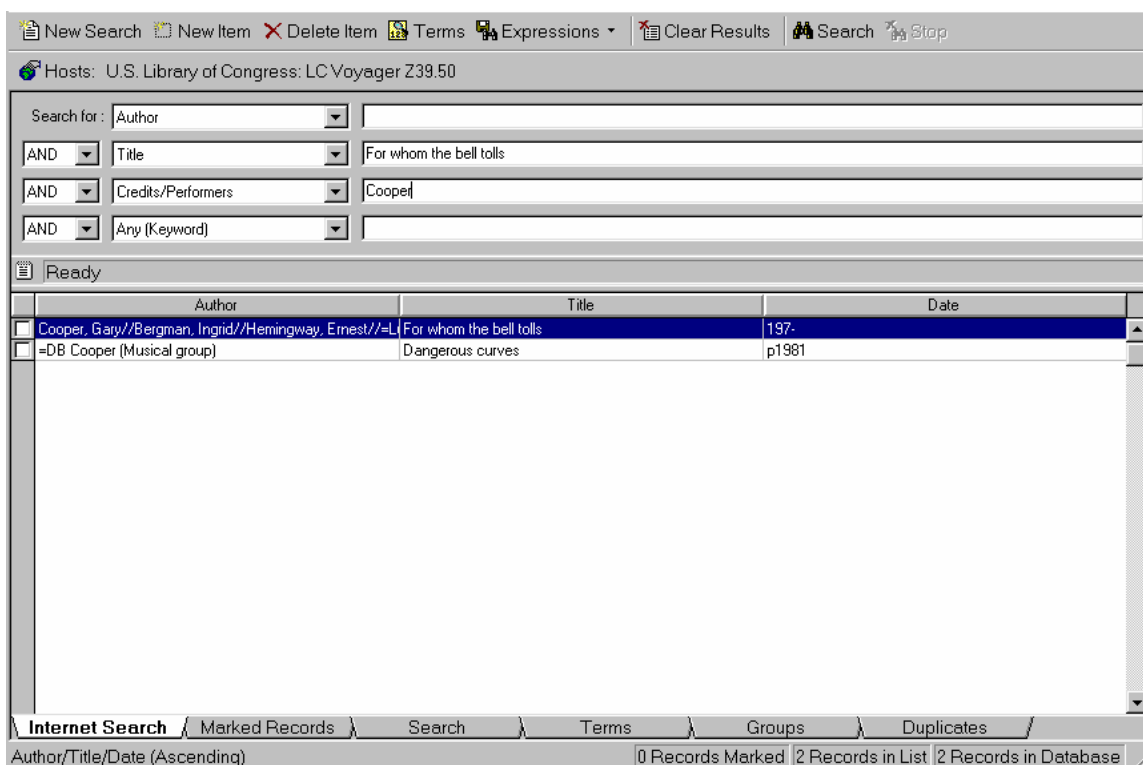
7. Click Search.

This time only 2 references are found. The references are imported and appear on the Internet Search tab.

8. Save results.

At this point you can peruse the retrieved records to see which ones you want to keep. All database functions are available, so you can edit, search, or perform other operations. You save records by transferring them into a new or existing ProCite database.

You can copy highlighted records to an open database using drag-and-drop or the **Copy** and **Paste** commands. You can also copy records directly to an open database, a closed database, or a new database with the **Copy Marked Records** command, as described below.

For this example, you will save the imported records to a new database called Cooper.

a. Select a subset of the records by selecting the check box next to the record with the Title For Whom the Bell Tolls.

Note: If you are wondering why the DB Cooper record was imported, it is because there is a song on the CD with the title For Whom the Bell Tolls, and all title fields in the record were searched.

b. On the toolbar, click the **Copy Marked** icon on the toolbar.

c. In the file dialog that appears, locate ProCite's Database folder, type a new name of **Cooper** in the text box, and click **Open.** ProCite asks whether to create the new file. Click **Yes** and the marked records are copied to the new ProCite database.

9. Close the temporary Internet Search database.

a. Click the database close box or choose **Close** from the **File** menu.

b. ProCite asks whether to save your Internet search results. Since you already saved the records you wanted, click **Discard** to close the temporary database.

Note: ProCite does not disconnect your internet connection. When you are finished searching online databases, remember to disconnect.

Because you did not close the Sample Database, it should appear when you close the temporary Internet Search database.

You can open the Cooper database to look at the records saved from Internet searching. When you are done, close it and return to the Sample Database.

Linking a Reference to a Web Page or File

You can add a URL or a path and filename to a ProCite record and later launch the attached URL or file. In the case of a URL, ProCite launches your default browser and directs it to the Internet location. In the case of a path and filename, ProCite launches the file as though you had double clicked the file icon.

Use the following exercise to launch an attached URL to a Web Page on the Internet.

Exercise — Launching a URL from a ProCite Record

To launch a URL found in ProCite's Location/URL field:

1. Go to the record by Reiger, Steve. Double-click to display the full record.

2. Notice the URL entered in the *Location/URL (38)* field.

3. From the **Tools** menu, choose **Open File/URL** or click the toolbar icon. ProCite launches your browser and directs it to the Internet location.

4. When done using the Web Page, exit the browser and close the ProCite record.

Note: You are not required to display the full record. You can launch a URL from a record list by highlighting the record and using the Open File/URL toolbar icon.

Entering and Editing ProCite References

You can add or edit records at any time. Each record can hold up to 100K of text. The following exercises will give you experience with the basic operations of entering and editing text in ProCite records.

Exercise — Inserting a New Record

To insert a new ProCite record:

1. From the **Database** menu, choose **New Record.** The New Record window appears.

2. Click the **Workform** box at the top left of the New Record window. Choose Book
   Short Form from the drop-down list.

3. Start by clicking in the *Author, Monographic (07)* field and enter: **Barrett, Daniel J.**

Note: Always enter author names in this order: **lastname, firstname middle.** While you can enter author names in any ProCite field, it is recommended that you enter names only in the following fields: *Author, Analytic (01), Author, Monographic (07), Author, Subsidiary (16)* and *Author, Series (30).* These author fields are automatically used for searching, sorting and formatting author names.

When listing multiple authors names, use a double slash (//), a semicolon(;), or a carriage return between author names. If you do not know all the names, indicate additional authors by using four slashes (////) after the last author in the field.

4. Click or tab to the *Title, Monographic (09)* field and enter:
   Net Research: Finding information online

5. Click or tab to the *Publisher Name (19)* and enter:
   Songline Studios, Inc.

6. Click or tab to *Date of Publication (20)* and enter:
   1997

Note: ProCite assumes the following fields may contain dates: *Date of Meeting (12), Date of Publication (20),* and *Date of Copyright (21).* These date fields are converted to an internal format that is used for searching, sorting and formatting references correctly.

7. To use a Field Content List for keywords, move the cursor to the *Keywords* field, then click the arrow to the far right of the field. The **Insert Term** dialog appears.
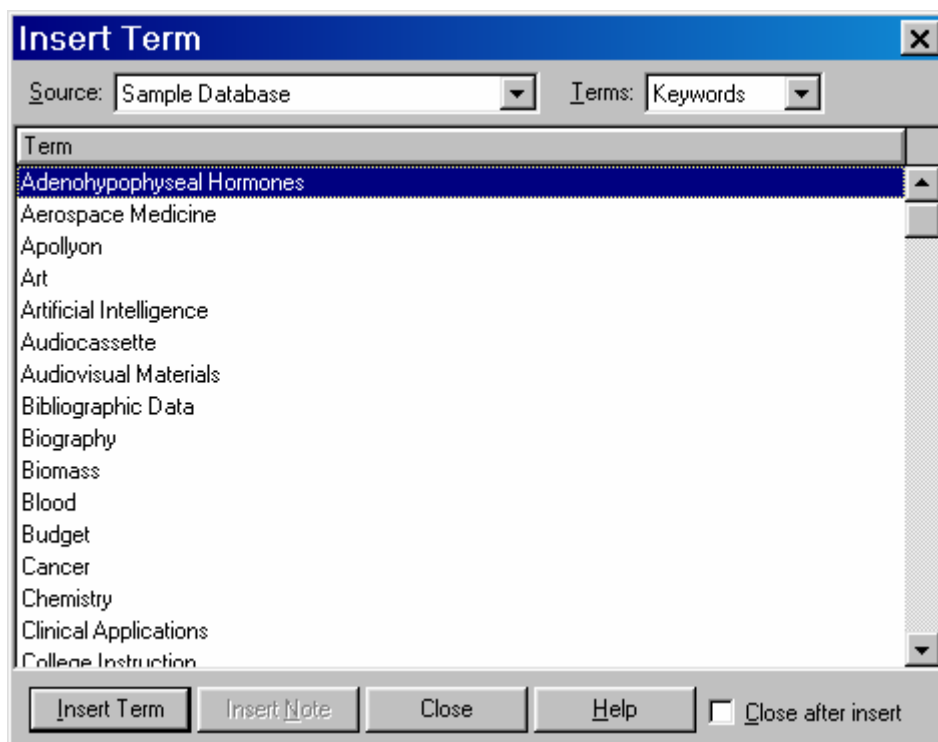
Note: Field Content Lists are internal lists generated from the *Author, Journal, Title* and *Keywords* fields. They can be used for data entry and searching.

8. Quickly type **co,** or scroll through the list to the word **Computers.** Select the word and click **Insert Term** to insert the text in the current field.

Note: You can also double-click on a term to insert it automatically.

9. Type **I** to move to the terms that start with the letter I. Select **Information** and click **Insert Term.**

10. When you are done inserting terms, click **Close** to return to the New Record window.

Configuring Duplicate Checking

When inserting records from multiple sources into a ProCite database, it is possible to enter duplicate records. To avoid this you can have ProCite warn you when it encounters a suspected duplicate record when saving records. You can also use the **Duplicates** tab to check for existing duplicates. You can mark duplicates and delete them after comparing the records.

Exercise — Setting Duplicate Detection

To set duplicate detection criteria:

1. From the **Database** menu, choose **Configure Duplicates**.

2. Select the check box titled **Warn about duplicates** when saving new records.
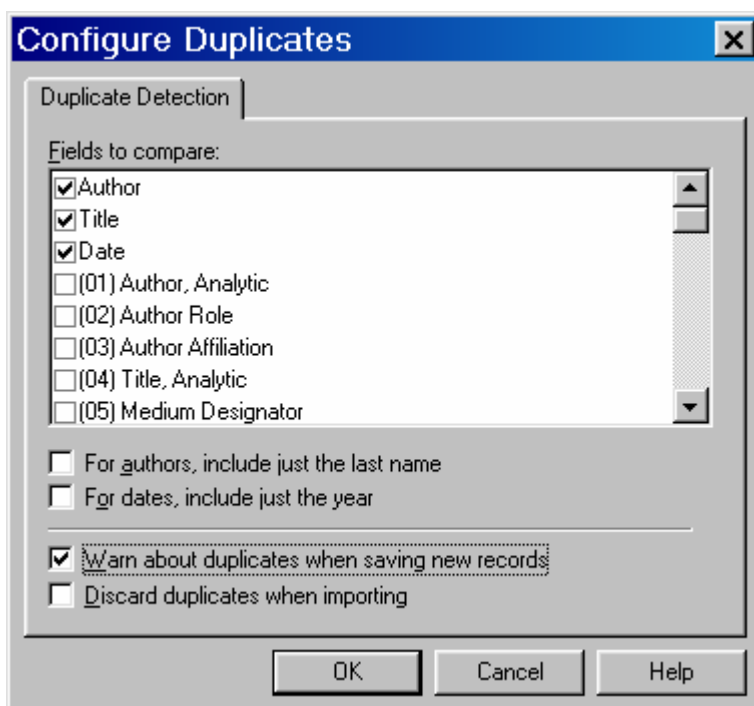
Searching and Sorting a Database

In this section of the Guided tour you will learn to:

- Quick search for records with the Terms tab

- Create a search strategy

- Save a search strategy

- Create a group of records

- Choose a sort order

Quick Searching for Records with the Terms Tab

Using the Terms tab, you can list records organized by certain fields such as Authors, Journals, Keywords, and more.

In the following exercise you will change the record list to view specific abbreviated records. The first list of records will include only those records that contain the keyword Computers.

Exercise — Specifying a List of Records to Show

To quick search with the Terms tab:

1. Click the **Terms** tab at the bottom of the window.

2. Use the drop-down **Show** list at the top left of the window to choose **Keywords.** A list of keywords appears in the left pane of the window. This list is compiled from all keywords in the active database. The number to the right of each keyword indicates how many records contain the term.

3. Scroll through the list and click on Computers. The records containing that term in the Keywords field appear in the right pane of the window.
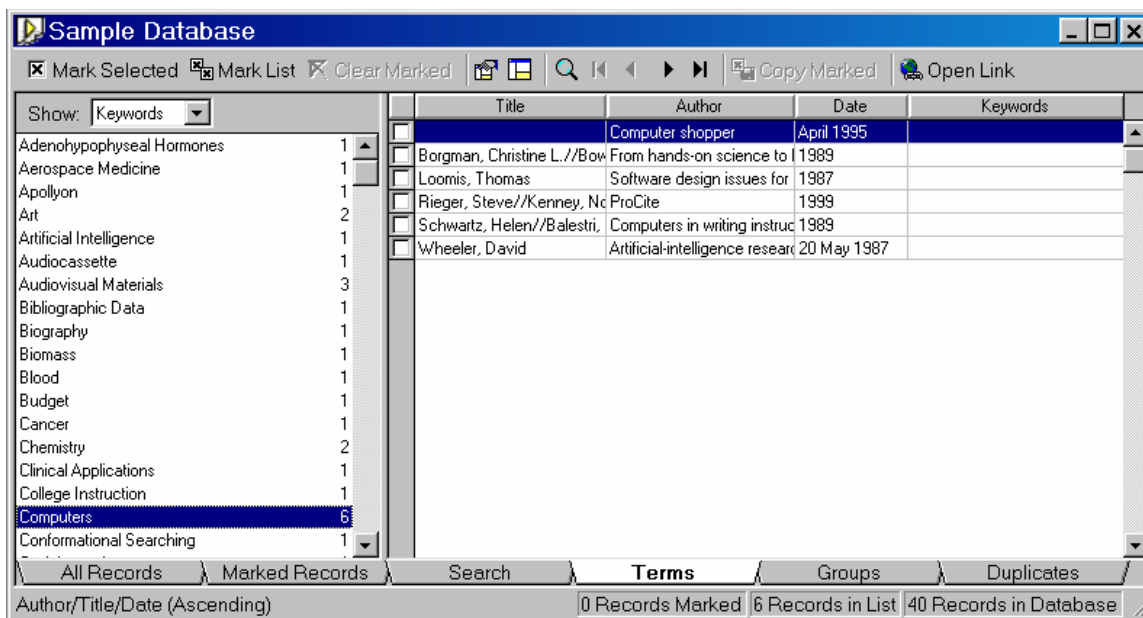
4. Next, try changing the selection on the **Show** list to **Workforms** to view records organized by their workform type.

5. Click the **All Records** tab to return to the full listing of records.

Creating a Search Strategy

Being able to search for and find certain records in a ProCite database allows you to access information for editing or printing bibliographies as well as other functions. Once you have located specific records you can mark, delete, edit as a group, or print the references.

There are a number of ways to set up a search in ProCite. You can use the **Search** tab to search every field in every record or limit the search to specific fields for faster searching. You can also use field content lists to simplify searching for authors, titles, journal titles and keywords.

ProCite has powerful searching functions that allow you to use relational operators such as = (equal), <> (not equal), > (greater than) and < (less than) as well as logical operators AND, OR, and NOT for finding records. ProCite includes special search values for *begins with, ends with, contains, empty,* and *not empty.* See *Chapter 13: Searching and Finding Records* for complete listings of operators you can use in Search Expressions.

A Search Expression is a description of the criteria you want ProCite to use in finding records in a database. A Search Expression consists of any of the following three elements.

- **Field Identifier** (Optional) — A unique identifier that limits a search to a specific field, group of fields, workform or group.

- **Operator** (Optional) — An instruction for creating relationships between search terms or an instruction on how to search a field.

- **Search Term** — A word or phrase you want ProCite to find.

The following exercises give you experience creating and saving a Search Expression as well as showing you how to create and sort a group of references prior to printing.

Exercise — Creating a Search Expression

To create a search expression:

1. Click the **Search** tab to display the Search window.

Note: At this point you can enter field names, operators, and search terms either by typing them or by using a combination of typing and pop-up lists. The most thorough (and time consuming) search is where the Search Expression contains only a search term. ProCite then searches all text in every field of each record. To limit the fields to search, enter a field identifier and operator prior to the search term. The fastest searches are on the indexed fields *Author, Journal Title, Title* and *Keywords.*

2. Click **Insert Fields** to limit your search to a particular field. The **Search Fields** dialog appears:
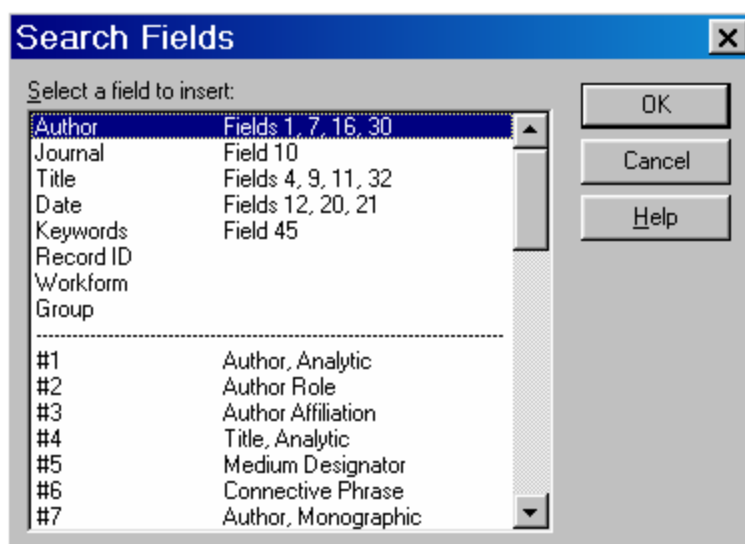
3. Highlight Keywords near the top of the list, and click **OK** to transfer the field identifier to the **Search For** text box.

4. Click **Operators** to enter a relational operator in the Search Expression. A list of operators appears:

5. Click CONTAINS to insert the operator in the Search Expression.

6. Click **Insert Term** to select from a list of terms. Check that the Terms drop box is properly set to Keywords. If not, use the arrow on the drop list to select the Keyword list.

7. Select **Research** from the list by scrolling or by typing to quickly move to a particular alphabetic section of the list. You can also use the Up/Down directional keys to move through the list and find your selection.

8. Paste the term in your search expression by double-clicking the term or clicking the **Insert Term** button. **Close** the Insert Term dialog.

9. In the drop-down box labeled **Look in,** select **All Records.**

10. Click **Search** to initiate the search for matching records. The matching records appear in the lower pane of the Search window.
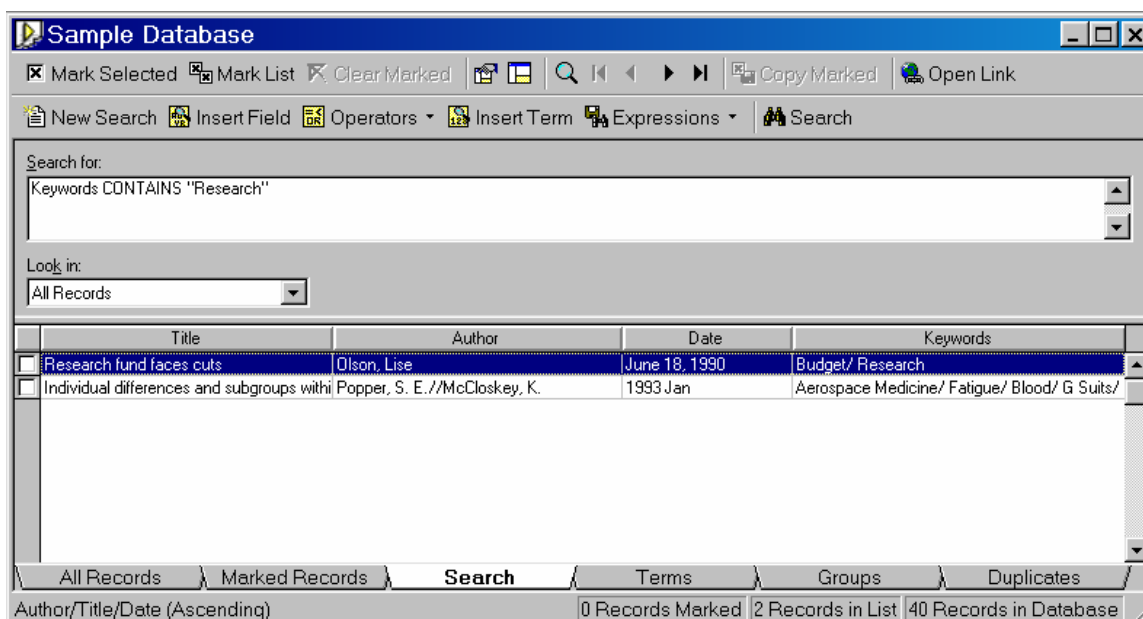
Saving a Search Strategy

It is useful to be able to save long, complicated search expressions or those that you use frequently. Use the following exercise to save a search strategy.

Exercise — Saving a Search Expression

To save a search expression:

1. On the Search tab, click **Expressions** and select **Add to Expressions.** ProCite displays the **Search Expressions** dialog.

2. Type **Search1** in the **Expression Name** box to identify the Search Expression and click **OK.**

Note: Recall a Search Expression by clicking **Expressions** and then selecting the name of the expression you want to use. Click **Search** to retrieve the same records plus new matching records entered since the last search.

Creating a Group

Groups are a way of creating virtual subsets of a database. Saving records in a group allows you to quickly retrieve a particular set of records. A group can contain the results of one or more searches, or a set of individual records. You can save any number of groups in your database and give each a unique name.

Exercise — Adding Records to a New Group

To save records to a group:

1. Use the search results from the keyword search. On the Search tab, click in the abbreviated record list to activate it.

2. From the **Edit** menu, choose **Select All** to highlight all records in the list.

3. From the **Groups** menu, choose **Add Record(s) to** and then **New Group.** The **New Group** dialog appears:
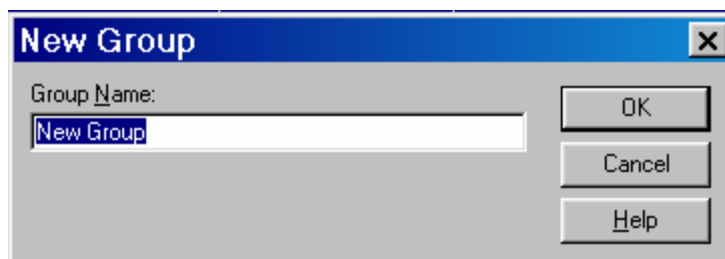
4. Type **Group1** as the name of your group, and click **OK** to save it.

Note: You would need to occasionally re-execute the search to update the records in a group.

5. Click the **Groups** tab at the bottom of the window to view the records in Group1. All group names are listed in the left pane.

6. To return to the full record list, click the **All Records** tab.

Selecting the Sort Order

The sort order you select for records is constant until you specifically change it. You can click-sort on any displayed column heading. Based on the fields displayed, ProCite selects the closest predefined sort to use. A second click on the column heading toggles the sort between ascending and descending order.

Preconfigured Sort Options

ProCite comes with seven predefined sort orders. The commonly-used sort orders are:

*   Author/Title/Date

- Author/Date/Title

- Author-Title/Title/Date

- Title/Date

- Date/Author/Title

- Call Number/Author/Title

- Record Number

You can easily select any one of these for display by choosing it from the **Sort** menu.

Custom Sorts

You can set up a custom sort order by using the **Configure Sorts** command on the **Sort** menu. You can:

- Compare one to six fields to determine the sort order on the **Custom Sort Order** tab

- Indicate how to sort empty fields, author fields and date fields on the **Custom Sort Option** tab

- Develop a Stop List of words to ignore at the beginning of a field on the **Stop List** tab

The order in which you sort a printed bibliography can differ from the viewing order on your screen. By default, ProCite uses the output style sort order for the bibliography. Use the following exercise to override the default setting and print the records using a different sort order.

Exercise — Changing a Sort Order for Printing

To change the sort order for printing:

1. From the **File** menu, choose **Print Bibliography.** A bibliography preview displays using the default output style, or the last output style selected, and its sort order.

2. Click **Configure** on the toolbar. The **Configure Bibliography** dialog displays the current bibliographic settings:
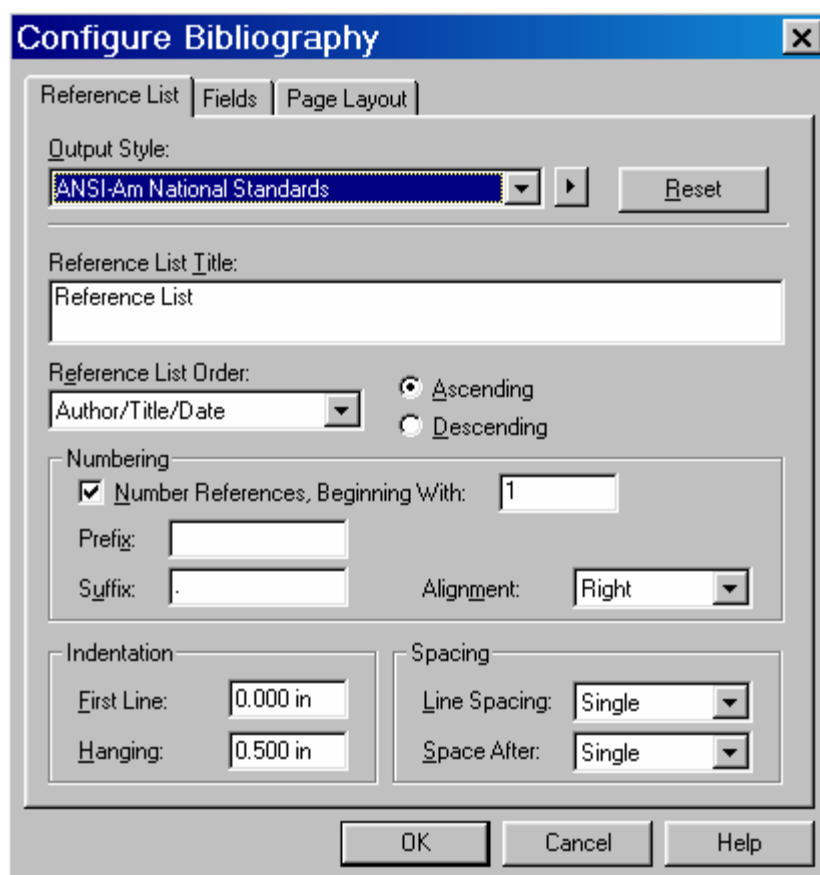
3. On the **Reference List** tab, change the **Reference List Order** by selecting the Date/Author/Title sort order in the drop-down list. Click the **Descending** radio button to begin the list with the most current records.

4. Click **OK** to update the bibliography preview with the new sort order.

Note: ProCite holds this setting until you select another sort or a different output style. See *Chapter 23: Creating and Modifying Output Styles* for information about changing the sort order associated with an output style.

5. Click **Close** to return to the record list.

Generating Bibliographies

You can "print" bibliographic citations to your computer screen, a word processor document, an HTML file, or a printer. You can print a full bibliography or a list that organizes references by subject.

In this section of the guided tour you will learn to:

- Create a bibliography from a record list

- Create a bibliography with subject headings

Creating a Bibliography from a Record list

ProCite always displays a preview of the formatted bibliography. You can make changes to your bibliographic settings before actually printing or saving to a file. The following exercise gives you experience with formatting and printing a bibliography.

Exercise — Printing a Bibliography

To print a bibliography directly from ProCite:

1. If it isn't already displayed, click the **All Records** tab to list all records in the database.

Note: You could also print **Marked Records, Groups,** or any other list of records using this method.

2. From the **File** menu, choose **Print Bibliography**. A bibliography preview displays using the last output style selected.

3. Use the buttons at the top of the window to **Zoom In** or **Zoom Out,** and to navigate through pages in a single or two page view.
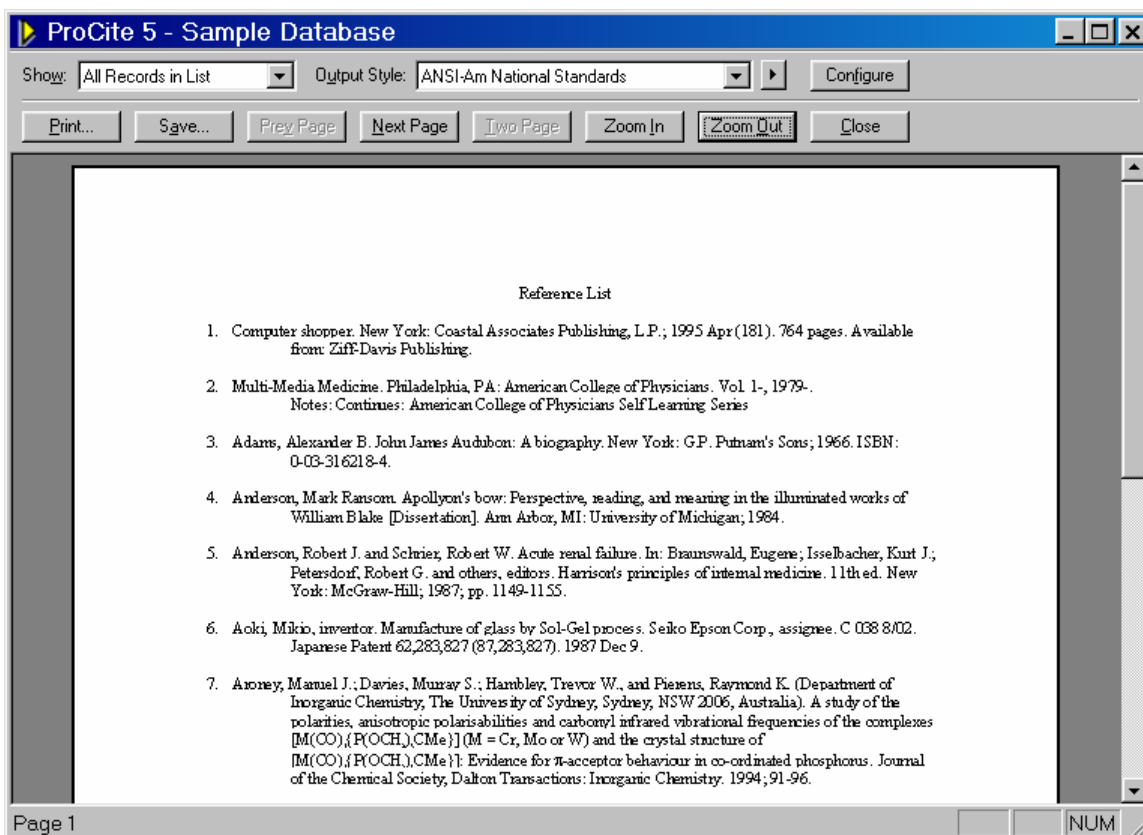
4. Switch to a different output style using the drop-down list. Select **AMA, American Medical Assoc** and watch the screen refresh in the new format.

5. Click **Configure** to change the bibliography settings.

- The **Reference List** tab provides another way to change the output style, add a title to your record list, and set the reference numbering and indentation.

- The **Fields** tab lets you suppress fields from printing and substitute alternate text for text found in records.

- The **Page Layout** tab controls font, size, margins and page number formatting.

6. Click the **Fields** tab to limit the fields printed. Remove the check mark from the **Notes** field to suppress it from printing. Click **OK** to save the change and update the bibliography preview.

7. Click the **Print** or **Save** button to complete the exercise.

Note: To save the bibliography to a file (MS Word, WordPerfect, HTML or Text Only), click the **Save** button and adjust the **Save File as Type** accordingly.

8. Click **Close** to dismiss the preview.

9. Practice printing Marked Records or groups of references using different output styles.

Creating a Bibliography with Subject Headings

A Subject Bibliography contains references arranged by subject headings. Typical subject headings are Keyword, Author, Title or Call Number, although you can select any ProCite field. Subject Bibliographies simplify the creation of a record list covering several topics, such as a faculty publication list or a list of holdings by category. You can also create a subject index to accompany the subject bibliography. Use the following exercise to print a standard Subject Bibliography.

Exercise — Printing a Subject Bibliography

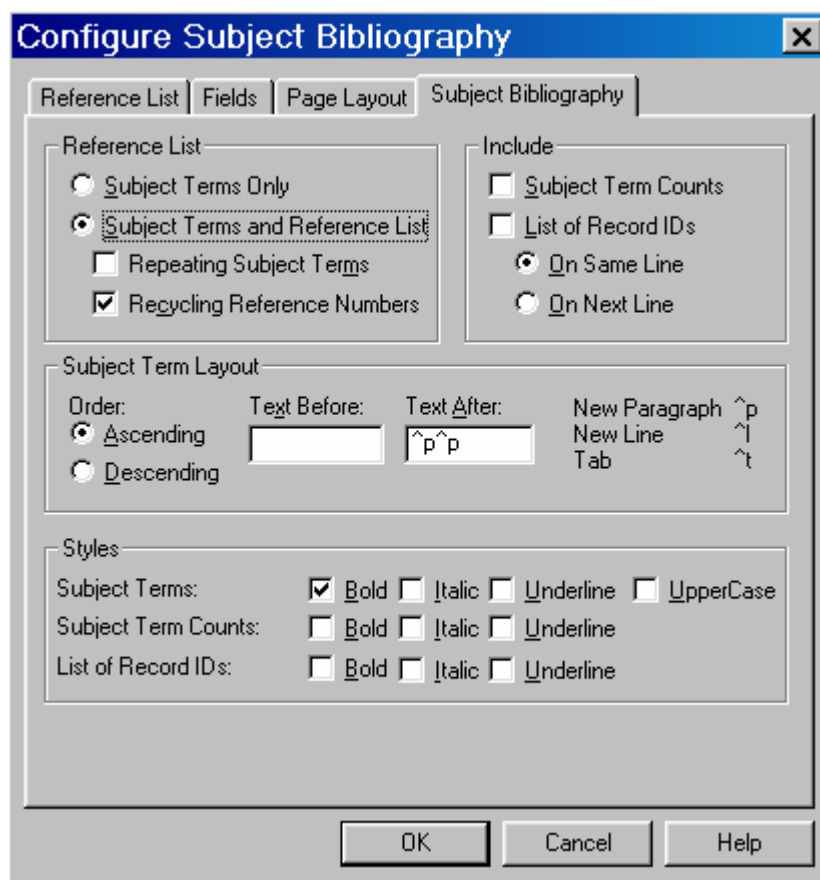**To print a subject bibliography:**

1. If it isn't already displayed, click the **All Records** tab to list all records in the database.

2. From the **File** menu, choose **Print Subject Bibliography.** ProCite displays the **Subject Fields** list, with the 45 fields listed by field number and default field name. You can also create a subject list by workform, even though it is not a ProCite field.
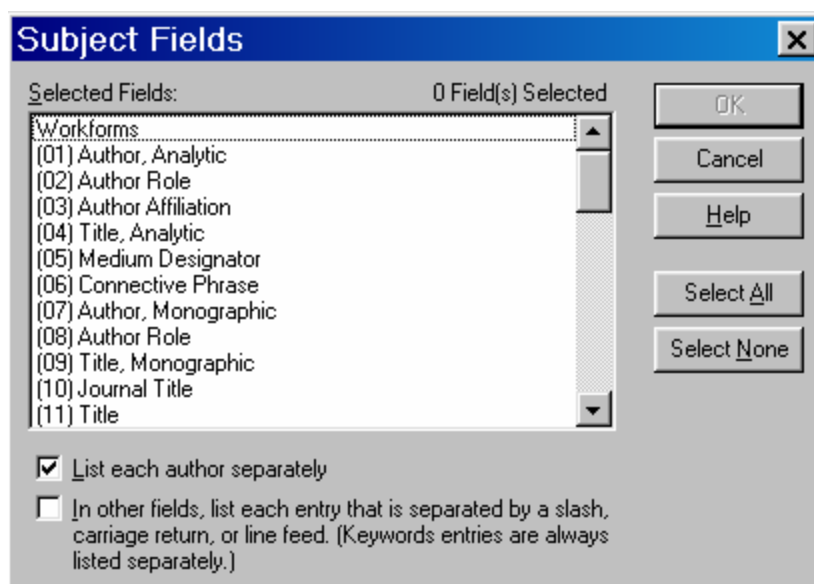
3. Scroll down the list and highlight the **Keywords** field (45) to select the field whose contents will be used as Subject Headings. Click **OK** to display the terms found in the **Keywords** field.

Note: You can select any number of fields for subject headings. If you build the list of headings from more than one field, the subject headings generated from those fields are combined into a single list.

4. Click the **Select All** button to include all the keyword terms as subject headings or use a Shift-click to individually select or deselect terms to include in your subject bibliography.

5. Click **OK** to preview the Subject Bibliography.

6. Click the **Configure** button and you find the same selections as with Print Bibliography.

7. Click the additional tab, **Subject Bibliography,** which controls formatting specific to a Subject Bibliography.

8. Create a standard Subject Bibliography by setting the Reference List to include the **Subject Terms and Reference List.** Check the **Recycling Reference Numbers** box to restart the reference number sequence under each heading. Click **OK** to preview the results.
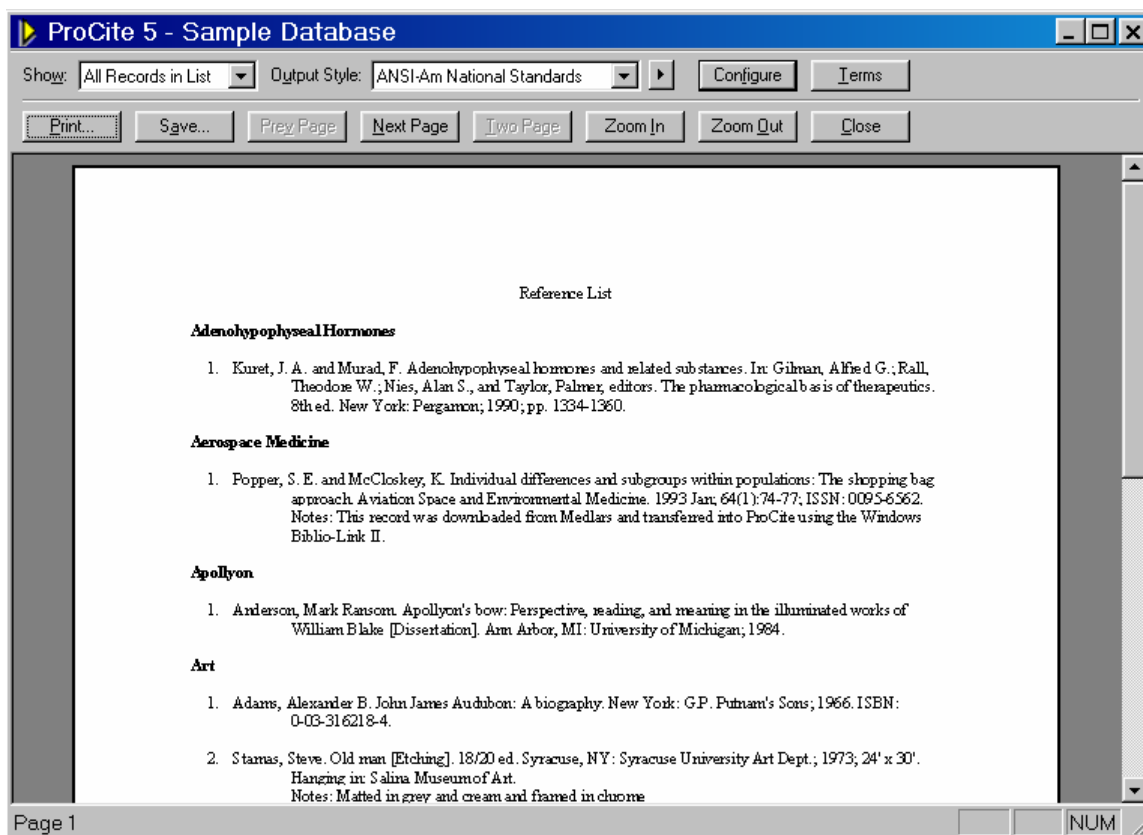
9. Next, create a Subject Index by selecting the **Configure** button and **Subject Bibliography** tab. This time, change the Reference List setting to **Subject Terms Only.** Include the **List of Record IDs** to print on the same line in the next section. Click **OK** to preview the results.

10. Click **Close** to close the preview and return to the record list.

Preparing a Manuscript and Bibliography

In this section of the guided tour you will learn to:

- Open a word processing document to use *cite while you write*
- Identify references to cite
- Prepare the bibliography and final manuscript
- Close the document and exit ProCite

Opening a Word Processing Document

ProCite 5 supports Microsoft Word 7, 97, 2000, and XP for Windows, Word 6.01, 98, and 2001 for the Macintosh, and WordPerfect 7, 8, 2000, and 2002 for Windows.

The Tools Menu and ProCite Toolbar

When you install ProCite, you also install ProCite menu items and a ProCite toolbar in your word processor. The contain *cite while you write* commands that allow you to locate and insert citations from your database and generate a bibliography. Each of the items on the toolbar corresponds with an item on the **Tools** menu.

Identifying References to Cite

The following exercises are designed for use with Microsoft Word, although you can apply the same steps to WordPerfect. The first step in formatting bibliographies is to locate the citations you want to include in a paper. ProCite provides three different ways to place citations in your document. Once the ProCite place holders are established, you are ready to generate the in-text citations and bibliography.

Exercise — Creating a Word Document

To create a Word document with linked ProCite records:

1. Start Microsoft Word.

2. From the **File** menu, choose **New** to create a new document. Click **OK** to continue with a blank document.

3. Type the sentence:
   It's easy to cite while you write with ProCite.

4. From the Tools menu, select ProCite 5 > Insert Citation.

Note: You could also use the Insert Citation button from the ProCite toolbar.

5. Type **Turtles**, a keyword, as the identifying text. Select the Turtles database in the drop-down list of databases to "Look In."
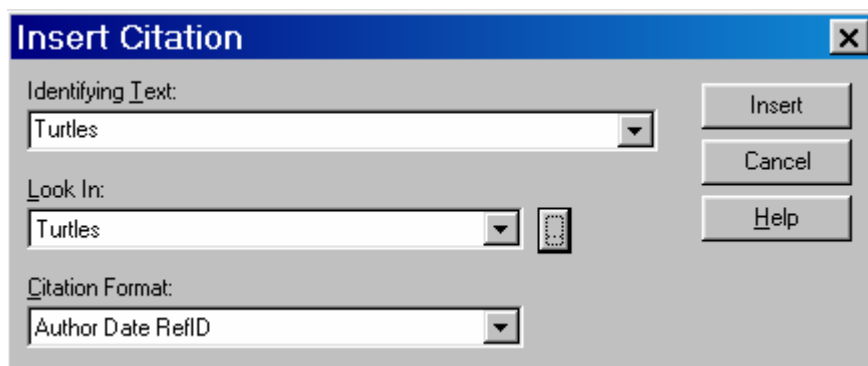
Note: You can look for any combination of author name, date, full or partial title, keyword and record number. Separate each item with a space or a comma. Surround phrases with quotation marks.

6. Click **Insert** to insert the citation. ProCite searches the database. When a single record matches the search, it is immediately inserted. ProCite returns a list if there is more than one item that matches the search.

In this case, you receive a list of 52 references. You can easily narrow the selection list by adding another term after Turtles, for example, the year 1996. Click the magnifying glass button to restart the search with the new parameter. This time only ten references are listed.

Note: You can change the sort order of the list by clicking on a column heading. For this tour, click the **Author** column heading to sort by author names.

7. Select references to cite in your document.

Note: Select references by clicking on the first one, Shift-clicking to select a series of references, or Control-clicking (Windows) or Command-clicking (Macintosh) to select a random group. Use the same commands on highlighted items to deselect them.

For this tour, select two references: the first by **Gitschlag** and the last by **Witzell.** Click the **Insert** button to insert the ProCite place holders in your document. The place holders look like this:

{Gitschlag 1996 #510}{Witzell, Azarovitz, et al. 1996 #390}

8. Start a new paragraph and type:
    You can also search and mark references in ProCite.

9. Switch to the full ProCite application to display the Turtles database, and mark one or more records by checking the box in the left column of the abbreviated record list.

10. Switch back to Microsoft Word. With your cursor placed after the new sentence, go to the **Tools** menu and select **ProCite 5 > Insert Marked Records** to insert the ProCite place holders in your document.

11. Start a new paragraph and type:
    Lastly, you can identify text in your manuscript and scan the document to add ProCite place holders. {crowder; conservation}

Note: You can use any character to delimit your identifying text. Curly brackets are a good choice and reduce the number of times you may need to "ignore" a selection. Notice that a semicolon is used to separate searches in one location.

12. From the **Tools** menu, select **ProCite 5 > Scan Document**.

13. Identify the left and right delimiters used in your document, enter the curly brackets if necessary, and select Turtles as the database to search. Click **OK** to begin the scan.

14. The first stop is the author name, Crowder. Insert a citation and ProCite automatically takes you to the next identifying text, conservation. Insert a citation from this list and the scan is complete.
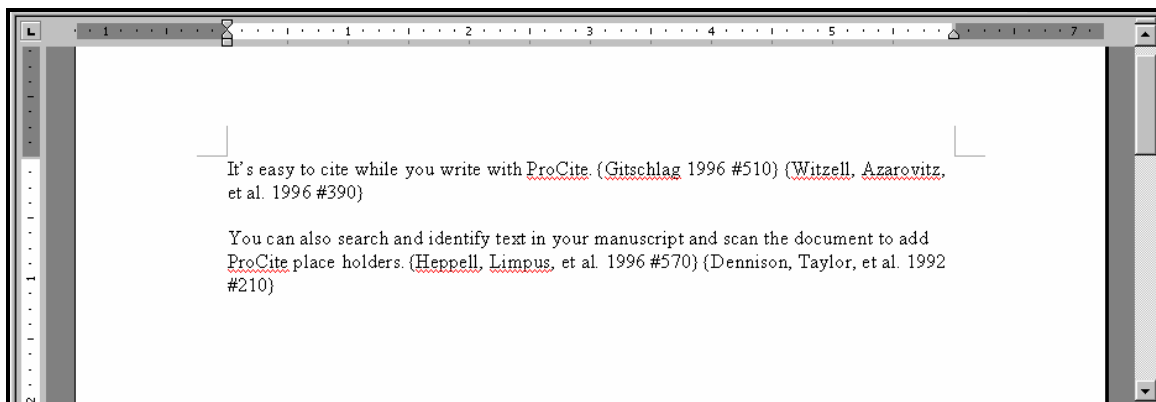
## Preparing the Bibliography and Final Manuscript

Once a ProCite place holder is inserted, it is linked to a record in a ProCite database and ready to format the final manuscript and bibliography. The format is determined by the

chosen output style and can include the author name and year, numeric citations, or any combination of ProCite fields.

Exercise — Generating the Bibliography

To generate a bibliography from in-text citations:

1. From the **Tools** menu, select **ProCite 5 > Generate Bibliography.** The Configure Bibliography dialog displays.

2. Set the output style to APA-American Psychological Assoc.
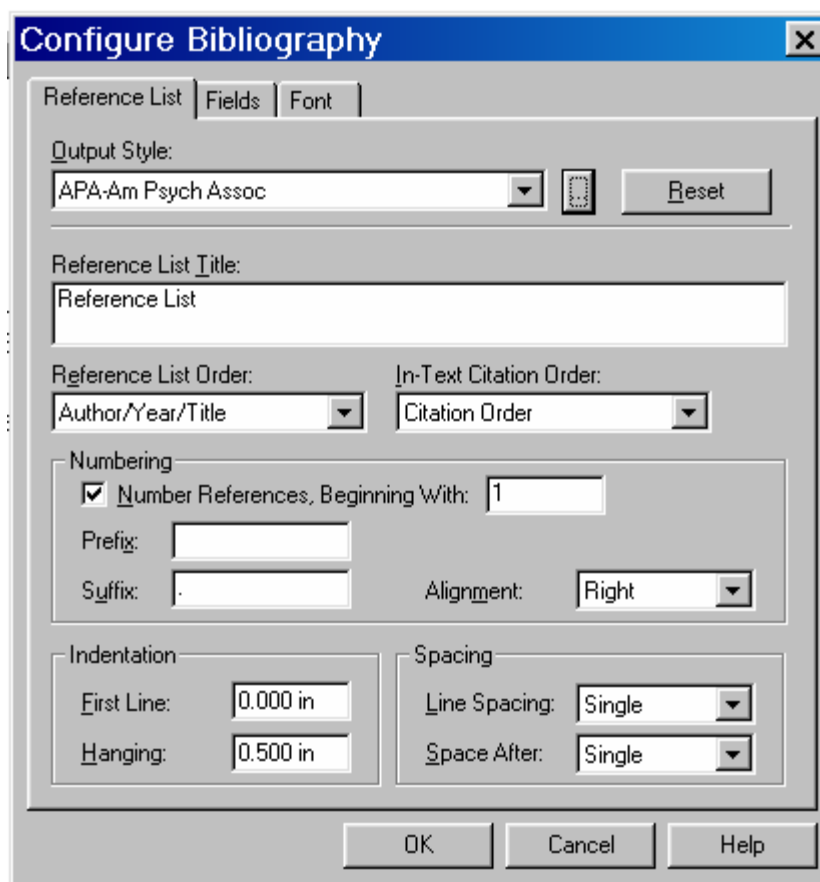
3. Click **OK** to generate the bibliography. The citations in your manuscript are converted to the in-text citation format for the American Psychological Association, and a bibliography is added to the end of the document.

Note: You can make changes to your manuscript and regenerate the bibliography at any time.

4. Select **Generate Bibliography** again and set the output style to **Journal of the Chemical Society.** You will need to use the browse button (...) and locate ProCite's Styles folder to select the style. Click **OK** to view this completely different style.

Closing the Document and Exiting ProCite

Save your manuscript, close your Word document, then exit ProCite.

You have successfully completed this guided tour! You are ready to begin building your own reference collection and creating perfectly formatted bibliographies.